

2014

Montana

Building Active Communities Workbook



**Communities
Transforming**

To make healthy living easier

Acknowledgments



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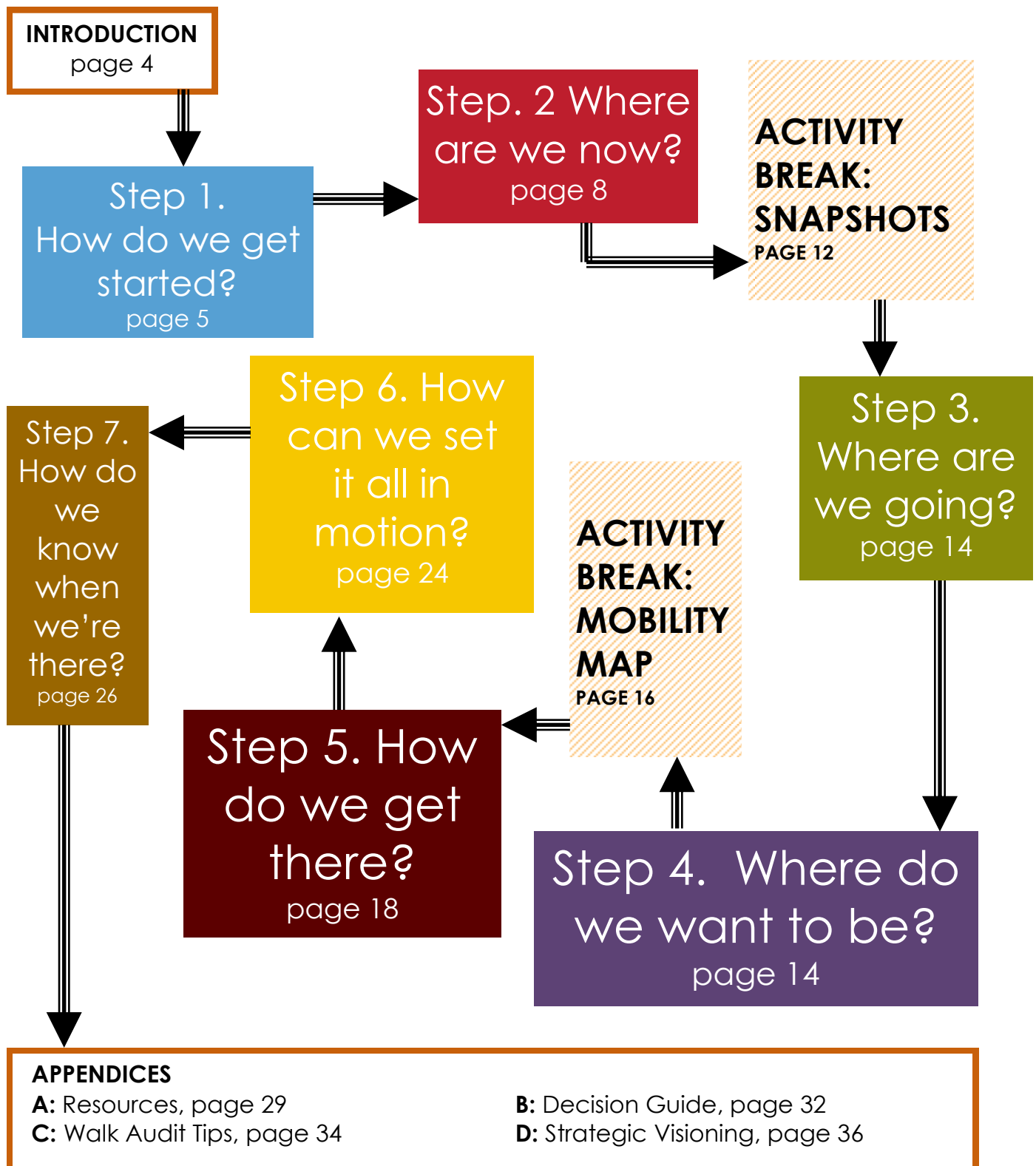
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The outline of this *Workbook* closely follows the structure of the Montana State University Extension *Strategic Visioning for Community Development*. Thank you to the principal author, Paul Lachapelle, for permission to use this resource as a model. *Strategic Visioning for Community Development* is included in the resources on page 30.

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Contents



Introduction

The key elements of active community design—a connected network of walking, biking and transit facilities in close proximity to important destinations, such as jobs, schools, recreational facilities and shops—are driven by policy. Mark Fenton, a widely recognized expert in healthy community design, wrote, “Simply ‘encouraging’ healthier designs or the use of enlightened principles when it is convenient to do so is not enough.” Community leaders must deliberately set our towns and cities on the right path with clear standards and policies.

This is a guide to doing that work. The *Workbook* is designed to help you think through and make a plan for implementing standards that enable and encourage active living. There are many excellent examples and case studies to generate ideas for what might work in your community. But every community is different, and your process and solutions will reflect the unique capacity and needs of your community.

This *Workbook* will prompt you to:

- Develop a strategy that pulls together crucial stakeholders in the areas of community design and active living;
- Identify solutions that are relevant to your community; and
- Build the support of local decision makers.

The *Workbook* highlights important steps along the way to adopting active living standards, from identifying who’s already working on an issue, to preparing messages that explain your approach and appeal to a broad cross section of the community.

We encourage you to start by familiarizing yourself with each of the seven steps laid out in this *Workbook*. Your Action Team (see page 7) may need to backtrack or jump ahead as you go. That’s fine. However, we strongly recommend that you fill out each of these planning steps with your Action Team as a way of drawing on your group’s perspectives and expertise.

Good luck and happy planning!

Step1 How do we get started?

Gather a team, share why you want to improve community design and enhance active living.

A. WHY ARE YOU INVOLVED AND WHAT ARE YOUR GOALS FOR BEING INVOLVED?

Pull together a few people you know who are interested in improving options for active living. Ask everyone to share their answers to the following questions:

- Why do you want to be involved?
- What aspect of this issue most interests you?
- What goals do you have for being a part of this work?

Keep track of important themes that come up in your conversation.

B. WHO ELSE IS INVOLVED?

Using a copy of the worksheet on the following page, make a list of who's already working on these issues in your community. Who are good resource people to go to for information about active community design programs or projects, local health statistics or a summary of the planning process for local transportation and/or recreation infrastructure?

For example: List your city engineer, public works director, county planner, nutrition and physical activity specialist at your health department, disability rights organizer or ADA coordinator, director of a local bicycle club, director of the local chamber of commerce, local school teachers or PTA members, president of the downtown association or business improvement district.

C. IDENTIFY DECISION MAKERS

Using a copy of the worksheet on the following page, list the people and/or agencies that have the authority to implement standards or change policies related to active transportation and active community design.

For example: List individual city and/or county commissioners.

D. IDENTIFY INFLUENTIAL PEOPLE

Using a copy of the worksheet on the following page, identify the people who have a significant influence over decisions related to the built environment and community design in your town and who may advise decision makers on this issue (in support or in opposition).

For example: List the city manager, health professionals, real estate developers, school administration, community organizers or politically engaged local residents.

WORKSHEET: Who else is involved, Decision makers and Influential people

Name	Title	Experience with or interest in active transportation/active living

E. FORM AN ACTION TEAM

Make a list of people who are committed to improving community design, increasing active living and revitalizing downtowns. Make sure the list represents diverse sectors of the community (business, government, schools, advocacy, public health, etc). The group should include the following:

- People who are passionate about physical activity and recreation
- People who are knowledgeable about transportation issues, including non-motorized transportation and community planning
- People who are directly affected by non-existent or inadequate walking, biking and bus transportation options (children, seniors, people with disabilities, low-income individuals, etc.)
- Public health professionals
- People who are committed to economic revitalization of downtown streets and historic districts
- Civic leaders and decision makers in your community

Get your group together in order to walk through the rest of these steps. Identify a team leader who will convene and facilitate meetings and keep track of your Action Team's decisions.

ACTION TEAM MEMBERS

Name	Title	Experience with or interest in active transportation/active living

Step 2 Where are we now?

Identify community design, active transportation and recreation assets and needs in your community

A. WHAT'S ALREADY IN PLACE?

Fill out the CHANGE Evaluation Tool spreadsheets. You can find a link to these on page 29. This tool will help you determine what policies and environmental elements are already in place in your community to support active living and good community design.

B. ENGAGE YOUR COMMUNITY

Use community engagement strategies to identify the active living and active transportation assets and needs in your community. These are some strategies you can try:

- Host a community listening session to gather a broad range of views about the local barriers to active living.
- Use informal conversations with friends and colleagues to collect more perspectives.
- Reach out to people most affected by the lack of non-motorized transportation infrastructure (school-age children, senior citizens, people with disabilities, those who don't drive) through a small-group listening session or focus group.

Consider asking these questions as a starting point for your conversation:

- Who is living actively already? Who isn't active? Why not?
- Where do people bike or walk in your community?
- Where do you see people walking or biking even when it isn't safe?
- What are the structures and conditions that keep people from getting to where they need to go by active means?
- Where is it rare to see someone on foot, riding a bicycle, using a wheelchair or pushing a baby stroller?

C. DEFINE THE ISSUES

Pull together what you've learned about the issues and barriers to active living created by community design and/or lack of accessible active transportation and recreation options by writing a statement that defines what you hope to address. Follow these two important guidelines in writing down your statement:

- Define the issues in terms of what's missing or what's lacking, not in terms of solutions (we'll get there soon).
- Define the issues as things that are shared by everyone, rather than laying blame on people or agencies who may be crucial partners in implementing solutions.

Helpful: "Very few residents in our community walk or ride a bike to work or school because the roads around town are dangerous for people."

Not helpful: "We should have bike lanes on Main Street but the Public Works Director won't put them in."

ISSUES:

1. _____

2. _____

3. _____

4. _____

D. ANALYZE THE ISSUES

Use the who/what/when/where/why questions to take a closer look at the issues you've just defined.

ANALYZE THE ISSUE

- a. What is the issue? (Use the definition you figured out above.)
- b. Who is affected?
- c. When did this issue arise?
- d. Where is this issue most prevalent?
- e. Why does this issue exist/persist?

ANALYZE THE ISSUE

- a. What is the issue? (Use the definition you figured out above.)
- b. Who is affected?
- c. When did this issue arise?
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- d. Where is this issue most prevalent?
- e. Why does this issue exist/persist?

ACTIVITY BREAK:

Snapshots

LET PICTURES TELL THE STORY

Take pictures of different parts of your community that show safe, inviting streets for pedestrians, cyclists or transit users. Include other pictures of areas that are dangerous or inconvenient to navigate on foot, bicycle or bus, and that need improvement. Snap something you're most proud of with regard to physical activity, and something that most needs improvement. Consider taking pictures at different times of day and on different days of the week.

Examples of pictures you could take include:

- ☐ Streets outside an elementary, middle or high school at the beginning or end of the school day
- ☐ Commercial districts, including your downtown business district, as well as any areas with box stores, a mall or strip development
- ☐ Residential areas, including representative neighborhoods from as many decades as you can find—be sure to include new subdivisions and old neighborhoods
- ☐ Streets around any local college, university campus, hospital or major employer
- ☐ Railroad crossings
- ☐ Bridges over rivers or interstate highways
- ☐ Shared-use paths and on-street bicycle lanes
- ☐ Sidewalks, crosswalks and sidewalk ramps
- ☐ Major intersections
- ☐ Traffic-calming measures like crosswalk bulb-outs, median strip landscaping, roundabouts or traffic circles
- ☐ Bus stops, transit center or train station
- ☐ Parks, public spaces and recreational trails
- ☐ Parking lots, on-street parking

ACTIVITY BREAK: Worksheet

MAKE YOUR OWN LIST OF SNAPSHOT LOCATIONS:

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Step 3 Where are we going?

Assess the trajectory your community is on when it comes to active transportation and active living.

ANALYZE THE TRENDS

Pull together what you learned in Steps 1 and 2 and then analyze where your community's current policies and standards are taking you with regard to active community design.

- Are the options for active transportation increasing or decreasing?
- Is most of the residential, commercial or school construction occurring on the fringes of town or in rural areas, or is there redevelopment occurring close to the core of the community?
- Is funding for accessible and non-motorized transportation options increasing or decreasing?
- What do public health and demographic statistics tell you about your community? Is the population getting older or younger? Healthier or less healthy? (Tip: Ask your county health department for help finding this data.)
- Are there indicators of community-wide interest in active living and active transportation that show whether support for active community design is changing?

Step 4 Where do we want to be?

Describe how you want your community to be designed. What elements of community design would make active transportation and recreation routine?

ARTICULATE YOUR VISION

Before digging into the details of what you're going to work on, step back and talk about the big picture of what active community design would look like in your community.

- What would you like a street to look like? In a residential neighborhood? In a busy commercial district? In the core of downtown?
- What would the ideal park look like?
- How would residents get themselves to work? School? Church? Park? Grocery store?
- Where would it be safe for kids to play?

ACTIVITY BREAK: Mobility Map

THE SCARY MAP

Sketch a map of the route you take to work, school, church, the grocery store, a friend's house or a neighborhood park. Highlight things along the way that discourage you from walking or riding a bike.

ACTIVITY BREAK:

Mobility Map

THE GOOD MAP

Now redraw the same route, noting changes along the way that you would make to improve safety and accessibility for cyclists, pedestrians and people with disabilities, or to simply make the route more appealing.

Step 5 How do we get there?

Identify standards and policy changes that will bring about the vision you have described. Find the right voices to carry that vision forward.

A. GENERATE SOLUTIONS

Start by getting some options on the table, but stay focused on standards or policies that will have broad public impact. Where can you find some ideas to start with?

- Reference the *Building Active Communities Resource Guide* or materials listed in Appendix A for ideas of what's worked in other places.
- Group brainstorm. Write every idea down exactly as articulated (avoid paraphrasing if possible), encourage creativity, and make sure everyone is heard.

SOLUTIONS:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

B. WEIGH YOUR OPTIONS

For each possible standard or policy your group has identified, write answers to the following questions.

STANDARD

- a. What are the best aspects or benefits of the standard?
- b. What are the potential drawbacks, costs or downsides?
- c. What are the possible side effects or unintended consequences of this approach (positive or negative)?

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C. PICK A PATH

Based on your evaluation of possible options, select the top-priority standard or policy approach the team will work to implement in your community. Use a consensus decision-making approach that seeks the support of everyone on your Action Team. See Appendix B for facilitation and consensus decision-making suggestions.

OUR ACTIVE COMMUNITY STANDARD WILL BE: _____

D. TELL YOUR STORY

Look back to Step 1 to review your list of decision makers and influential people. Is the list still right for the strategy you've picked? This is your audience.

Write a series of statements that will help your audience understand the importance of the approach you are proposing. Remember that different arguments will appeal to different people. Identify which people need to hear each message and who the ideal messenger(s) would be.

AUDIENCE(S)	MESSENGER(S)
A. How will this standard or policy help create a community with more opportunities for people to lead active lives? Why is adopting this standard the right thing to do for the health and well-being of people in your community?	

AUDIENCE(S)	MESSENGER(S)
<p>B. How will this standard or policy approach make the community safer to get around, especially for kids, the elderly and the mobility impaired?</p>	

AUDIENCE(S)	MESSENGER(S)
<p>C. Why is it urgent that people get behind this initiative?</p>	

AUDIENCE(S)	MESSENGER(S)
<p>D. How will this standard or policy make your community a more appealing place to live? How will it benefit local businesses?</p>	

AUDIENCE(S)	MESSENGER(S)
<p>E. Given the unique circumstances in your town, what else helps to tell your story?</p>	

Step 6 How can we set it all in motion?

Lay out the steps that will turn your planning into action.

OBJECTIVES AND TASKS

Describe a series of objectives that will build toward the adoption of your proposed standard or policy.

For example: Summarize model sidewalk ordinances and loan programs. Meet with the city manager and public works director to assess technical barriers. Meet with community stakeholders that might be affected by the policy to assess public support or concerns. Meet with elected officials to assess political obstacles, support, opposition and concerns. Publicize the proposed sidewalk ordinance and loan program with a public presentation and forum, etc.

List specific tasks that will need to be completed to achieve each short-term objective. *For example: By March 16, Jeannie will call the public works departments in Kalispell and Livingston to ask how they manage their sidewalk replacement programs. By April 2, Todd will reserve the meeting room at the library for a public forum.*

OBJECTIVE				DEADLINE
Specific tasks to reach objective above	Who's responsible	To be done by	Date completed	Help or resources needed

OBJECTIVE				DEADLINE
Specific tasks to reach objective above	Who's responsible	To be done by	Date completed	Help or resources needed

OBJECTIVE				DEADLINE
Specific tasks to reach objective above	Who's responsible	To be done by	Date completed	Help or resources needed

Step 7 How do we know when we're there?

Measure the impact of your work.

A. PLAN FOR IMPLEMENTATION

Just because a policy gets adopted doesn't mean it will be implemented. Think ahead about how the standard will be implemented. Who are the key people or agencies that will be in charge of putting the changes into action?

For example: Note that the Public Works Department will manage the design and contract bidding for sidewalks, and the Finance Department will handle the loan processing. Is there a certain time every year that the public is informed of the program and invited to participate?

IMPLEMENTATION STEPS

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

B. PLAN FOR EVALUATION

How will you know when you've succeeded? How will you measure the impact of any changes?

For example: Map priority areas in need of sidewalk continuity. Request a report from the Public Works Department indicating sidewalk improvements completed during the past year.

EVALUATION MEASURES

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

C. REPEAT THE CHANGE TOOL

One year after your standard has been implemented, return to the CDC CHANGE Tool (link on page 29) and fill it out again. What has changed? What has changed on the ground that the CHANGE Tool doesn't highlight?

Appendix A Resources

American Public Health Association, Safe Routes to School National Partnership. 2012. *Promoting Active Transportation: An Opportunity for Public Health*. Retrieved from: http://www.apha.org/NR/rdonlyres/42FBB4CA-4E2A-4C74-BDD7-317E7C814F9B/0/Links_Final_Active_Primer_singles.pdf

- A primer on the connection between transportation planning and public health. Includes several case studies of transportation planning processes that have included public health as a guiding principle.

America Walks. 2012. *Steps to a Walkable Community: A Guide for Citizens, Planners, and Engineers*. Retrieved from: <http://americawalks.org/walksteps/>

- A guide for developing and implementing strategies that make communities more walkable. Includes advocacy tips as well as sample policies or standards ranging from design and engineering elements to education and enforcement.

Bipartisan Policy Center. 2012. *Lots to Lose: How America's Health and Obesity Crisis Threatens our Economic Future*. Retrieved from: <http://bipartisanpolicy.org/projects/lotstolose>

- A broad overview of systemic and environmental factors related to obesity. Includes a series of recommendations for federal and local government policy reforms.

Centers for Disease Control and Prevention, U.S. Department of Health and Human Services. 2009. *Media Access Guide: A Resource for Community Health Promotion*. Retrieved from: <http://www.cdc.gov/healthycommunitiesprogram/tools/pdf/mediaaccessguide.pdf>

- A series of suggestions and guidance for getting your story in the media. Includes templates for press releases and letters to the editor.

Centers for Disease Control and Prevention, U.S. Department of Health and Human Services. 2011. *Strategies to Prevent Obesity and Other Chronic Diseases: The CDC Guide to Strategies to Increase Physical Activity in the Community*. Retrieved from: http://www.cdc.gov/obesity/downloads/PA_2011_WEB.pdf

- A summary of behavioral change and built environment strategies designed to prevent obesity and related chronic diseases.

Centers for Disease Control and Prevention, U.S. Department of Health and Human Services. 2010. *Community Health Assessment and Group Evaluation (CHANGE): An Action Guide*. Retrieved from: <http://www.cdc.gov/healthycommunitiesprogram/tools/change/downloads.htm>

- An assessment tool and action guide for making policy, systems and environmental changes that improve public health.

Continued on next page

Appendix A Resources

Fenton, Mark. 2003. *Tips on Leading a Walk Audit*. Retrieved from <http://www.markfenton.com/resources/TipsLeadingWalkAuditFenton.pdf>

- A guide to leading a successful group walk audit.

Fenton, Mark. 2012. "Community Design and Policies for Free-Range Children: Creating Environments that Support Routine Physical Activity." *Childhood Obesity*. Retrieved from: <http://online.liebertpub.com/doi/pdfplus/10.1089/chi.2011.0122>

- A proposed physical activity "intervention framework" that outlines crucial elements of active community design and the policies or interventions that will bring them about.

Gann, Georgia, Katy Hartnett, Kevin DeGood, Nick Donohue, Sarah Kline and David Goldberg. 2012. *Making the Most of MAP-21*. Transportation for America. Retrieved from: <http://t4america.org/resources/map-21/handbook/>

- A guide to the federal transportation funding bill, MAP-21.

MacCallum L, Howson M, Gopu N. 2012. *Designed to Move: A Physical Activity Action Agenda*. American College of Sports Medicine, Nike, Inc., International Sport Science and Physical Activity. Retrieved from: <http://designedtomove.org/>

- A summary of the inactivity epidemic and proposals for getting kids moving through sports and everyday activity. Includes lots of info graphics, case studies and a compelling overview of the issue.

National Initiative for Children's Healthcare Quality. 2010. *Advocacy Resource Guide*. Retrieved from: http://www.nichq.org/advocacy/obesity_resources/toolkit.html

- An advocacy guide designed for health care professionals who want to address obesity through policy change. Includes an overview of the inactivity epidemic, introduction to advocacy and policy making and an Advocacy Toolbox with sample letters, fact sheets and policy language.

Rodriguez, Daniel. 2009. "Active Transportation: Making the Link from Transportation to Physical Activity and Obesity." *Active Living Research*. Retrieved from: <http://www.activelivingresearch.org/node/12296>

- A research brief summarizing scientific findings in the fields of active transportation, physical activity and obesity.

Safe Routes to School National Partnership. 2011. *Safe Routes to School Local Policy Guide*. Retrieved from http://www.saferoutespartnership.org/sites/default/files/pdf/Local_Policy_Guide_2011.pdf

- A summary of policy initiatives that support safe routes to school. Includes case studies and a policy change framework.

Appendix A Resources

Smart Growth America, National Complete Streets Coalition. 2011. *Complete Streets Policy Analysis*. Retrieved from: <http://www.smartgrowthamerica.org/documents/cs/resources/cs-policyanalysis.pdf>

- A thorough analysis of Complete Streets policies across the United States, including a summary of best practice elements and implementation steps.

Smart Growth America, National Complete Streets Coalition. 2012. *Complete Streets: Local Policy Workbook*. Retrieved from: <http://www.completestreets.org/webdocs/resources/cs-policyworkbook.pdf>

- A workbook with planning guidance for developing and adopting a Complete Streets policy. Includes step-by-step questions to prompt your planning.

Walkable and Livable Communities Institute. 2012. *Walkable 101: The Walkability Workbook*. Retrieved from: <http://www.walklive.org/project/walkability-workbook/>

- A facilitator's guide and series of slideshows designed to guide walkability workshops, audits and policy changes.

Work Group for Community Health and Development, University of Kansas. 2012. *Community Tool Box*. Retrieved from <http://ctb.ku.edu/en/dothework/index.aspx>

- A broad-based series of guides and toolkits designed to aid community-based initiatives. Includes chapters on assessment, strategic planning, meeting facilitation, evaluation, media outreach, etc.

Appendix B Decision guide

THE COMMUNITY TOOLBOX GUIDE TO MAKING A DECISION

When it comes to how to make a decision, you can:

1. Have someone decide, and then announce the decision to the group
2. Gather input from individuals, and then have one person decide
3. Gather input from the group, and then have one person decide
4. Vote
5. Try to build consensus among everyone at the meeting

All of these are feasible alternatives that may be chosen at different times. For the group problem-solving process, however, we strongly recommend the last option. Choosing by consensus - discussing and debating the possibilities until everyone comes to an agreement - is often the strongest of these ideas, because everyone is part of the solution. Members are much more likely to fully support a decision that they had a hand in creating.

That's not to say that it's always easy to build consensus. Sometimes, it might be; when the group has looked carefully at all of the options available to them, one might jump out as clearly being superior to the others. But, when the solution is not so evident, it can be quite a challenge to form an agreement, especially if people in your group have strong opinions one way or another.

The following tips are often helpful to keep in mind during the discussion:

- Avoid arguing blindly for your own opinions. It's easy to get so caught up in what you believe that you don't really hear what others are saying. Be sure to listen as carefully as you speak.
- Don't change your mind just to reach an agreement. If you aren't happy with a solution now, it's not likely it will please you much more when you are doing the work several months down the line.
- It's easy to think of this as an "all or none" situation: someone must win, and someone has to lose. That's not necessarily the case. If the group is locked between two different possibilities, see if a third will be more palatable for everyone involved.
- If people are becoming frustrated, or you are making no progress, then take a break. Have some coffee, work on something else for a few minutes, or adjourn for the day. Sometimes, just a short breather can give people a new perspective.

Appendix B Decision guide

What if you can't reach an agreement?

If a thorough discussion doesn't seem to result in a decision on which everyone agrees, you have a couple of options. (Hint: The group can decide before you debate solutions what you will do if you can't agree on any of the proposals.)

- You can try one of the other decision-making possibilities mentioned above (nominate one person to make the final decision, vote, etc.).
- You can try what authors David Quinlivan-Hall and Peter Renner call the "nominal group technique." To do this, ask each participant to assign a number to every solution, with one being their favorite solution, two being their second favorite, and so on. The numbers are all added up, and the solution with the lowest value is the one chosen.
- In some cases, you might choose not to decide, or to defer the decision until the next meeting. Some ideas and opinions may change if people are allowed some time to mull them over.

Whatever you as a group decide to do, the facilitator should ask for feedback after the decision has been made. Questions might include:

- "Do you have any problems you would like to air?"
- "Do you have any suggestions that might make this better?"
- "Are you completely satisfied with the solution we have chosen?"

SOURCE:

Work Group for Community Health and Development, University of Kansas. 2012. *Community Tool Box*. Retrieved from http://ctb.ku.edu/en/tablecontents/sub_section_tools_1134.aspx

Appendix C Walk audit tips

Walk Audit Tips
© Mark Fenton 2003

Tips on Leading a Walk Audit

Walk audits (or walkabouts) are facilitated walks for an interdisciplinary group of community stakeholders, often led by a design expert, with the following potential goals:

- **Education.** Guides people to experience and assess the physical activity and healthy eating “friendliness” of an area, not just look at it theoretically.
- **Inspiration.** Helps leaders and policy makers to explore what could be possible.
- **Practical planning.** Outstanding way to get everyone--professionals and not--actively involved in project or policy development, valuing each person’s input.

Participants. Anyone who can influence or is affected by the built environment: Planners, public works, engineers, architects and landscape architects, public health and safety, school officials; elected and appointed officials (city/county council, planning commission, school board); parents, children, elderly, people with disabilities.

Distance. Typically 0.5 to 2.0 miles; for a 30 to 90 minute walk, allowing time to stop for observation, discussion. A one-hour, roughly 1.5 mile walk can work very well.

Route. Should be determined ahead of time, and ideally pre-scouted by the facilitator. It should include a mix of supportive and challenging settings for healthy eating and active living, ideally with several safe (out of traffic) places for the group to stop and talk.

- Good e.g.: Park, trail, walk- & bike-friendly downtown, traffic calming (curb extensions, islands, raised crossings), community garden, farmer’s market.
- Bad e.g.: Wide roads, no crosswalks, speeding traffic; malls & sprawling subdivisions, fast food strip development.
- Surprises: Goat trails, bikes parked at trees or parking meters (or other evidence of user demand), overlooked gems (small neighborhood park or green grocer).

Appendix C Walk audit tips

There are four major elements of the walk:

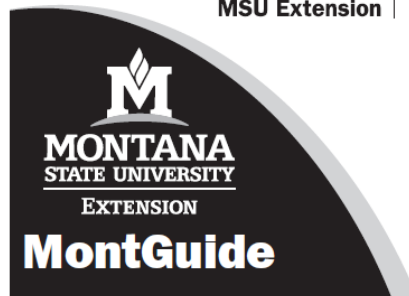
- **Introductions:** Should be brief. Needs to connect the group and understand the mix of perspectives.
- **Education/set-up.** This could be as much as an hour-long PowerPoint presentation on healthy community design. Or could be a 10 minute discussion of elements that participants offer as examples of what supports community health. But either way, start the walk by first thinking about what leads to healthier behaviors:
 - ◇ A varied mix of land uses (live, work, shop, play, learn, pray close together).
 - ◇ Good connections for pedestrian, bicycle, and transit use (sidewalks, trails, etc.)
 - ◇ Functional, inviting site designs (buildings at the sidewalks, trees, benches, etc.)
 - ◇ Safety and access for users of all ages, abilities, incomes (lights, traffic calming)
 - ◇ Accessible, appealing, and affordable healthy food options.
- **The Walk.** Consider having participants use a 1 to 10 scoring system for considering the environment, 10 being the most health supporting, 1 the least. At occasional stops, have participants state their scores, and give examples of why it is what it is (“too much traffic, only a 4;” or “great trees & benches & lots of people, 8”). No right or wrong answers, just a device to help all to observe and share.
- **Discussion/planning.** Immediately following a walk is an ideal time to develop specific conceptual plans, project details, and ordinance recommendations.

SOURCE:

Fenton, Mark. 2003. *Tips on Leading a Walk Audit*. Retrieved from <http://www.markfenton.com/resources/TipsLeadingWalkAuditFenton.pdf>

Appendix D Strategic Visioning

A Self-Learning
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Strategic Visioning for Community Development

By Paul Lachapelle, Community Development Specialist, and MSU Extension Agents Katelyn Andersen, Ravalli County, and Wendy Wedum, Cascade County

Strategic visioning is used by communities to identify future goals and work collectively to address community development needs. This guide provides an overview of the benefits of strategic visioning, situations appropriate to apply the techniques, and the steps to plan, implement and evaluate a visioning process.

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What is Strategic Visioning?

Strategic visioning is a process in which community members discuss past and present community issues, determine positive qualities and assets, identify future goals, design a plan for the community, carry out a series of actions, and evaluate the outcomes. A strategic visioning process provides a framework to identify community core values and assets, describe overall goals, and determine specific objectives and strategies that assist with community decision making. The process outlines what a community could be or should be like in the short and long-term future. Through collective dialogue and reflection, strategic visioning has the potential to lead to community action by creating a “road map” to the future.

What are the Benefits?

Visioning brings community members together to discuss past trends, evaluate present realities, and determine their common future. The process gives members of a community the opportunity to explore new ideas and encourages community members to lay out options, discover creative and innovative ideas, and focus on the positive aspects of the community. The purpose of strategic visioning is to:

- Encourage and engage diverse citizen participation
- Develop a shared community plan for the future
- Advance the capacity of community organizations and partnerships
- Expand the leadership base

- Strengthen individual skills
- Collectively identify and analyze what is important to the community
- Make better community decisions
- Use resources more effectively
- Build trust, improve communications, and encourage productive teamwork and relationships
- Focus on positive community change

When is Visioning Needed?

The process of strategic visioning can be helpful if a community wants to be proactive in future planning or if there is confusion, misunderstanding or hostility in a community about goals, strategies or issues. Community visioning can include topics such as education, safety, economic prosperity, and senior and youth issues. Visioning is often challenging if the community is divided or unable to engage in dialogue because of past or present conflict. Challenges can also result from poor leadership or when those in positions of power are not supportive of the process or outcome. Most importantly, strategic visioning is needed when past visioning statements and related action plans are incompatible, conflicting, outdated, or simply do not meet the current needs of the community.

The Visioning Process

There are generally five steps to a visioning process which each include specific actions and tasks.

TABLE 1: The Five Steps of Strategic Visioning

Visioning Step	Action	Description
STEP 1: Where are we now?	Inventory	Find descriptive data; Identify values
STEP 2: Where are we going?	Trends Analysis	Gather trend data; Determine possible future scenarios
STEP 3: Where do we want to be?	Vision Statement	Identify preferred future
STEP 4: How do we get there?	Action Plan	Determine actions that support vision statement
STEP 5: Are we getting there?	Implement and Monitor	Implement plan; Monitor indicators

Source: Ames (2006)

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Building Active Communities Workbook 2014 Draft

STEP 1: Where are we now?

The first step to a community visioning process is to create a community inventory that includes important data on the social, economic and environmental aspects of a community.

Start with community meetings or focus groups that generate statements about core values, key standards and specific strategies that will help to define the vision for the community's future. The Asset Inventory and Mapping process provides an opportunity for broad public participation. Survey the community to discover important values, attitudes, beliefs, and knowledge. This information can be compiled into a community profile to better understand your current community situation.

ASSET INVENTORY AND MAPPING

In this approach to community visioning, assets include any item or characteristic of value in a community, and mapping helps identify how the assets are connected. The Asset Inventory and Mapping (AIM) process engages individuals by asking questions and focuses on the positive attributes of a person, a situation, a resource, or the community as a whole. The process concentrates on what is working well, rather than trying to fix what does not work. Instead of focusing on what is lacking, AIM identifies, links, and enhances the core strengths of the community. It is particularly helpful for the community trends analysis and in creating the vision statement.

Several key principles when using AIM for visioning:

- Communities change in the direction in which they ask questions; positive questions lead to positive changes.
- With AIM, communities will discover more of what is good. The process is meant to engage the entire community in a discovery of "what is working well around here?"
- People have more confidence to make changes and move into the future (the unknown) when they carry forward parts of the past (the known). Focusing on the positive aspects of the past can lead to a positive future.
- It is important to value differences in ideas, opinions, and assets because these differences are a key part of the visioning process.

Source: Kretzmann & McKnight (1997)

STEP 2: Where are we going?

The next step is to create a trends analysis. First, organize the data collected in Step 1 to determine trends that happened in the past and appear to be continuing in the present. Use the trends analysis to construct probable scenarios or events that are likely to continue. The analysis should be based on factual data to avoid controversy and to better understand where there may be missing data. The trends analysis can be organized using the Community Capitals Framework.

THE COMMUNITY CAPITALS FRAMEWORK

The Community Capitals Framework can be used in all of the visioning steps but is very important when looking at trends. The framework helps to better understand how investments within a community exist, interact and compliment each other. Within each community, there are various assets or capitals that contribute to the potential of a community to develop and prosper. Capital in a

community is the stock of accumulated goods and services available at any given time; it is the net worth or value of all of the tangible and intangible items in a community. A community can invest in these goods and services with the hope of increasing the worth of overall community capital.

The community can identify key elements related to the following seven community capitals:

- Financial capital includes the fiscal resources available to invest in community capacity-building. This includes supporting business development, encouraging civic and social entrepreneurship, and accumulating wealth for future community development.
- Political capital reflects access to power and power brokers, such as local, county, state, or tribal government officials, or leveraging resources with a regional company.
- Built capital is the community infrastructure such as telecommunications, industrial parks, water and sewer systems, and streets/roads.
- Natural capital refers to environmental assets (natural resources and amenities) such as parks, farm land, and features of the landscape.
- Cultural capital reflects the way people act and interact, and the values, rituals, customs, and habits that are shared and practiced.
- Human capital includes the skills, abilities, and educational potential of people in a community, and the ability to access outside resources. It also addresses the leadership capacity of a community to be inclusive, participatory and proactive in shaping the future.
- Social capital reflects the connections between people and organizations and involves the ties that create and maintain trust, reciprocity and networking.

Source: Flora & Flora (2008)

STEP 3: Where do we want to be?

With an inventory and framework established, the community should come together to craft a vision statement describing how the future will look when the community achieves its objectives and reaches its goals. The first draft should organize recurring themes that have appeared from the inventory and mapping and trends analysis and any community surveys that were collected. The community may decide that this draft will first be organized by a smaller group of individuals, such as a steering committee.

The vision statement should be brief but detailed about significant attributes of the community, environment, people, and culture; it should describe a clear picture of the preferred future. Look for community efforts including vision statements and strategic plans from the past, as these may be helpful jumping-off points.

THE VISION STATEMENT

The vision statement is the mission of the community and the benchmark or standard by which change is measured. The statement is a critical aspect of the visioning process and should be done deliberately and with as much cooperation from the community as possible. The statement should briefly address the following questions:

- What is important in our community? Is it the geographic location, the culture, the history, etc?

Continued on next page

Appendix D Strategic Visioning

- Who are we as a community and what makes our community unique? What do we want our community to be known for? What are the unique features of the area? Ask the fundamental question, “What is our story?”
 - What is our desired future? What is our dream for the future if we had all the resources available to us? Think about the “what if” portion of the statement.
 - What attributes should be enhanced? What do we do well and how can we continue on this path?
 - What do we want our community to be, or look like in the future?
 - How would others describe our community? How do we want others to describe our community?
 - What parts of our community do we want future generations to enjoy, remember and appreciate?
-

STEP 4: How do we get there?

This step is the action planning phase that contains specific actions and strategies that support the vision statement.

Create a specific action plan that details the following:

- What is the desired outcome of the plan?
- Who is responsible for accomplishing specific tasks in the plan?
- How detailed is the timeline to meet the objectives?
- Is the budget realistic and are there commitments from funding sources?
- How will the plan be implemented?

STEP 5: Are we getting there?

The final step involves implementing, monitoring and continuously evaluating the action plan to ensure that the plan is being carried out with the intended consequences. In order to effectively monitor and evaluate the plan, identify key indicators so that the community knows objectives are being met. It is critical that the entire community understand the many characteristics of indicators since it is often difficult to determine the qualities of a good indicator.

USING INDICATORS TO EVALUATE ACTION PLANS

An indicator is like a yardstick to measure how well an action plan is being carried out and whether the goals of a strategic vision are being met. Good features of indicators can make it easier to measure the progress of a community visioning process.

There are eight desirable characteristics of an indicator:

- **Measurable:** Indicators can be counted to measure change over a given time period. For example, “there were 15 new jobs created in the renewable energy sector in the last two years.”
- **Reliable:** Indicators should be measured precisely and accurately. If it is reliable, it should also be repeatable and can be measured accurately by different people. For example, changes in the number of new jobs over a given period of time is a reliable indicator since the jobs can be counted and are an observable fact by anyone.

- **Cost-Effective:** Indicators should be cost-effective, generally using simple equipment and techniques. A measurement that takes a long time to acquire or is expensive is not likely to be analyzed over the long-term. An example is a short survey asking business owners about economic trends and job opportunities.
- **Significant:** Indicators must relate to conditions or features that are important to the visioning process. For example, the community is concerned with attracting new businesses and with identifying jobs that may result from them.
- **Relevant:** The relevancy of the indicator refers to the types of changes from visioning-related activities. For example, did the change in employment opportunities result directly from the visioning process and action plan, or was there another cause for the change?
- **Sensitive:** Indicators can serve as an early warning sign of change. For example, an action plan may call for the creation of five new jobs in a certain sector, and the plan should outline exactly how to create the jobs.
- **Efficient:** Indicators are most efficient if they represent broader conditions and reduce the total number of items that must be monitored. For example, measuring an increase in employment in one sector of the service industry, such as the number of motel staff, may reflect changes in other sectors, such as the revenue stream of the motel, without having to directly measure those changes.
- **Responsive:** The indicator being monitored should be responsive to change. If for example, the community is interested in increasing the number of jobs in the renewable energy sector, there should be a market for those jobs and the potential to create those opportunities.

Source: Phillips (2005)

How Does our Community get Started?

Timing is an important first step for community members to determine if the community is ready to begin. Members of the community should ask, “Do we have an existing strategic vision that is adequate and accurate? Do we have community support to begin and carry out a visioning process? Do we have the leadership and resources (time, funds) to conduct strategic visioning?”

It is essential to identify key individuals who are willing and able to commit to planning, coordinating, implementing and monitoring the visioning process. These individuals should be part of a steering committee, providing leadership throughout the process. All aspects of visioning, including the duties of the steering committee, should be inclusive of all members of the community, involve a diversity of sectors (youth, elderly, socio-economic, geographic location), and be readily available so that data and plans are accessible and promoted. It is critical to obtain the approval of community partners. Partners may include elected or appointed officials, community business leaders, clergy, school administrators, teachers, and civic organizations.

As the community begins the process, it is important to promote and discuss the intentions, processes and outcomes with the public. Effective communication is critical to a successful strategic vision process. Throughout the process,

be proactive and involve all community members, encourage a diversity of viewpoints, and make information available in all stages of the visioning process. The following should also be considered at the early stages of the visioning process:

- Identify a community coach or find a facilitator who is seen as neutral
- Set up a steering committee and groups of volunteers
- Actively seek out diverse representatives of the community (age, socioeconomic status, new and long-term residents, etc.)
- Organize community discussions; offer dialogue sessions at various times and meeting locations to reduce barriers
- Coordinate a corresponding leadership capacity-building program for all sectors of the community
- Get commitment of resources (time and money) for participation in all steps of the process
- Communicate effectively on the process and outcome and be transparent in providing information at all steps.

Strategic visioning requires strong leadership in order to sustain the momentum of the project and reach an end result that is satisfactory to everyone. The development of a community vision can be a lengthy and time consuming process. It can be difficult not only to recruit and engage the community but to keep individuals invested throughout. In order for strategic visioning to be successful, it requires the process be organized, focused, and well-managed. It also requires the community to be actively engaged, eager for dialogue and change, and concerned about its future.

Regardless of how a community undertakes strategic visioning, the process will likely lead to enhanced trust, increased skills, knowledge and abilities of community members, improved communication and relationships, and a sense of responsibility and teamwork. More importantly, strategic visioning can produce an outcome that will result in positive actions and sustainable healthy communities with enhanced social, economic and environmental changes that can last for generations.



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TASKS OF A COMMUNITY COACH

The use of community coaches is becoming an important component in responding to community change. Community coaches do not provide answers; they support capacity-building by helping community members learn from one another and from drawing on their own experiences to help the community find solutions. The coach can reside in or outside the community; they can be paid or unpaid; they can be professional community development practitioners or a new resident who is invested in the welfare of the community.

Key tasks of a community coach include:

- Helping groups see the bigger picture by continually enlarging and clarifying questions and issues.
- Identifying, modeling and illuminating collaborative practices and the value of collaboration.
- Helping teams understand groups that might be potential partners and tying these to the strategic focus.
- Asking clarifying questions about how opportunities relate to the core purpose and current priorities of the community.
- Helping the community to see, discuss and determine what is doable at the intersection of projects, resources and budgets.
- Defining, synthesizing and communicating strategic considerations.
- Identifying and highlighting key learning opportunities leading to new relationships drawing in participants across geography, race, education and income differences. Source: Emery, Hubbell & Polka (2011)

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Communities Transforming

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